Evolving to a Paperless Office

Get Off That Paper Trail!

Enterprise Content Management

Today's agenda

- Overview of ECM

- Capturing and Managing Content

- Storing and Delivering Content

- Questions and Answers

What is Enterprise Content Management (ECM)?

■ Technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes.

■ ECM capabilities manage and integrate traditional, **paper-based** content types and new **electronic** content types.

■ Also known as
  ■ Integrated document management
  ■ Digital asset management
  ■ Integrated document and content management
  ■ Total content management

Source: Association for Information and Image Management (AIIM)

Why do you need ECM?

What are you trying to accomplish?

- Improve efficiency

- Faster turnaround, improved response

- Better customer service

- Reduce costs

- Upgrade existing system

- Risk management/business continuity

- Compliance

Source: "Capture and Scanning in Government" Survey, February 2005, Association for Information and Image Management (AIIM)

What are the key challenges that you face?

- Justify the investment, gain commitment

- Change management

- Content control, data migration, classification

- Get employee commitment

- Understand and specify requirements

Source: "Capture and Scanning in Government" Survey, February 2005, Association for Information and Image Management (AIIM)

Trend towards outsourced solution?

- Most government agencies currently purchase capture and scanning technologies directly from the manufacturer

- However, most would prefer to purchase capture and scanning technologies from a company focused on an outsourced solution

- Trade-offs
  - Insourced solution – have direct control over infrastructure, must have dedicated staff and justify large capital expenditure
  - Outsourced solution – provider manages infrastructure and staffing to meet service level agreements, cost based on useage

Source: "Capture and Scanning in Government" Survey, February 2005, Association for Information and Image Management (AIIM)

If You Outsource -- What should you look for in an ECM provider?

- System that allows for flexibility and scalability

- High percentage of automated data capture through character recognition

- Comprehensive reporting

- Ease in form template creation and modification

- Secure, web-based access
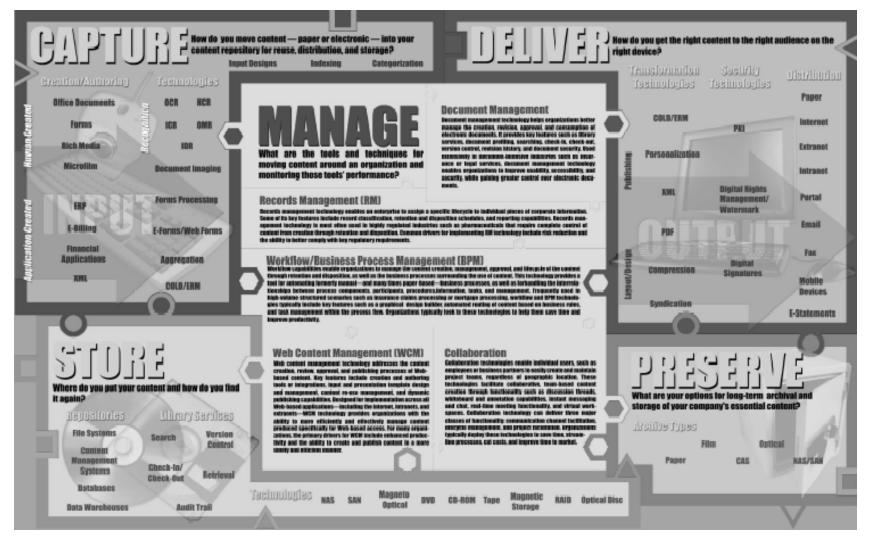
- Fixed pricing

What are other governments saying?

- "I receive electronic images of all paper documentation and don't have to worry about documents being lost or damaged."

- "I can create 'electronic' folders so that supporting documentation can be associated easily."

- "I can view document images and make informed decisions quickly, without handling paper documents."

- "I can search and retrieve information instantaneously!"

- "My staff's productivity has been enhanced with decentralized access and online retrievals without geographical restrictions."

What else are other governments saying?

- "Data entry has been minimized."

- "Exception processing caused by data entry error has been reduced."

- "I can resolve customer service inquiries more quickly."

- I have saved significantly on costs associated with paper storage and retrieval. No more costs for internal maintenance or upgrades!"

- "I like the security, control and disaster recovery."

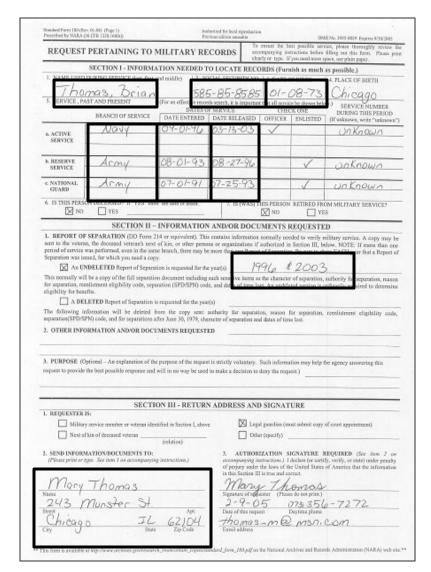- "As an outsourced solution, I didn't have to invest in software and hardware."

How does ECM work?

Source: Association for Information and Image Management (AIIM) and DocuLabs

Step 1: CAPTURE CONTENT

■ Consistent method of receiving, validating and processing applicant data regardless of format in which it is received (paper, scanned, "digital born")

■ Optical character recognition/ intelligent character recognition technology is used to capture the key data based on a template defined during implementation

Scanning and verification

Scan paper transactions

- Ability to scan various size/shape documents, boxes, photos, and checks

Forms recognition

- Auto-identify forms from a pre-defined 'form library'
- Recognize hierarchical forms associated to folders
- Recognize and handle situations where pages or required documents are missing

Image cleanup and enhancement

- Automatically perform cleanup such as the following:
  - Reorients mis-oriented documents
  - Aligns and resizes image
  - Filters noise
  - Separate touching characters

ICR/OCR for forms

- Distinguishes between form data and applicant data
- Recognizes constrained and unconstrained field

Verification workflow

- Ability to configure capture workflow and process
- Ability to specify an automatic "push" of work to operators

Step 2: MANAGE CONTENT

- You define the business rules that will be applied to the content

- Standard, ad hoc, balancing and management reports should be available

Business rules processing and indexing

Business rules processing/indexing

- Ability to validate captured data against other interfaces

- Ability to configure and add rules easily

- Ability to have parameter-based rules

- Ability to group transactions in queues based on various criteria

Validation exception handling/data correction

- Recognize change of address on a form

- Allow an operator to classify correspondence and route it

- Allow operators to correct data immediately or send to an exception queue

Indexing

- Determine how many data fields should be captured

- Search on the indexed fields
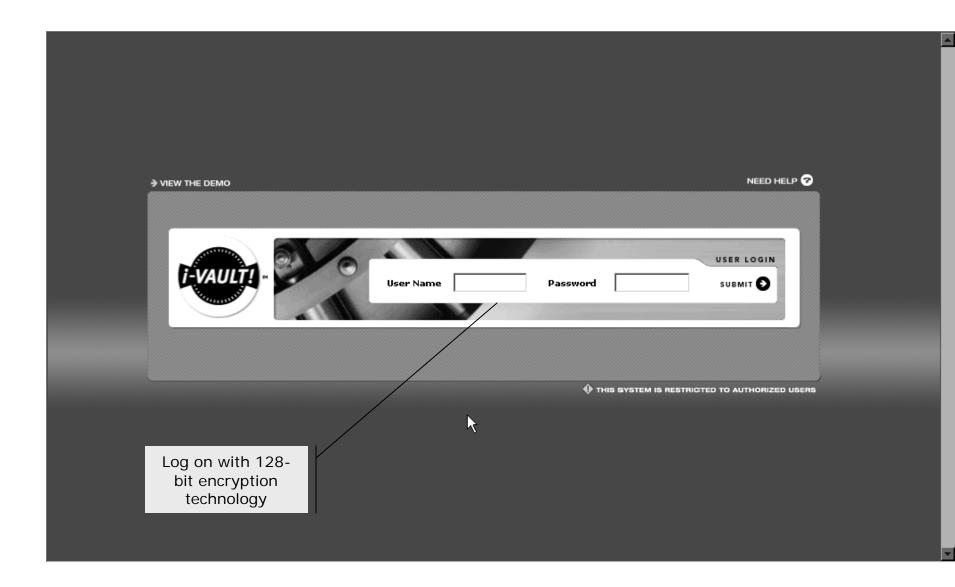
- Configure search screen by application or user group

"Inside the image archive"

- **Security**
  - SSL 128-bit encryption technology
  - Passwords should expire every 90 days
  - System should time out after XXX minutes of inactivity

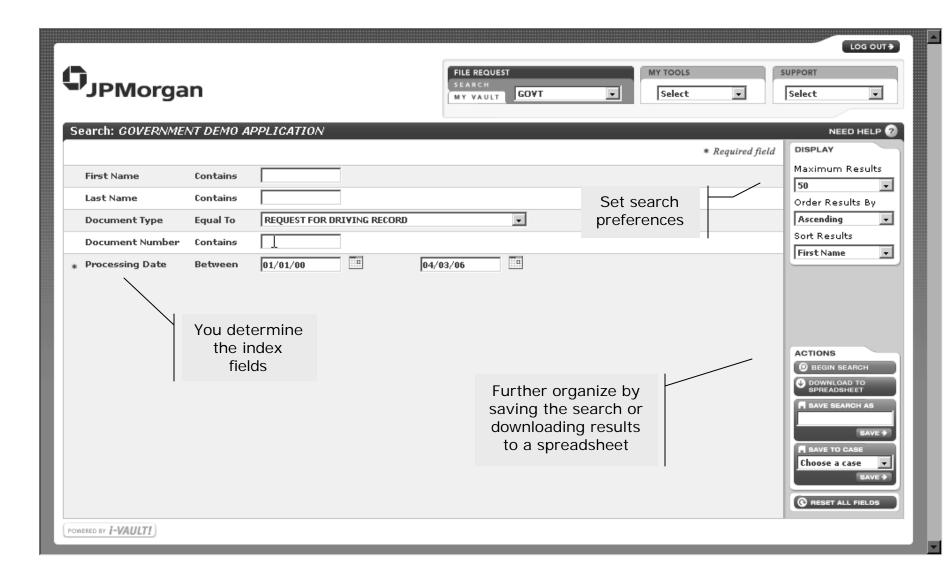- **Redundancy**
  - Two hot-site archives

Step 4: DELIVER CONTENT

- Customers should be able to securely browse and query data on the image archive system

- Three levels of security access and control are ideal
  - Agency security administrator
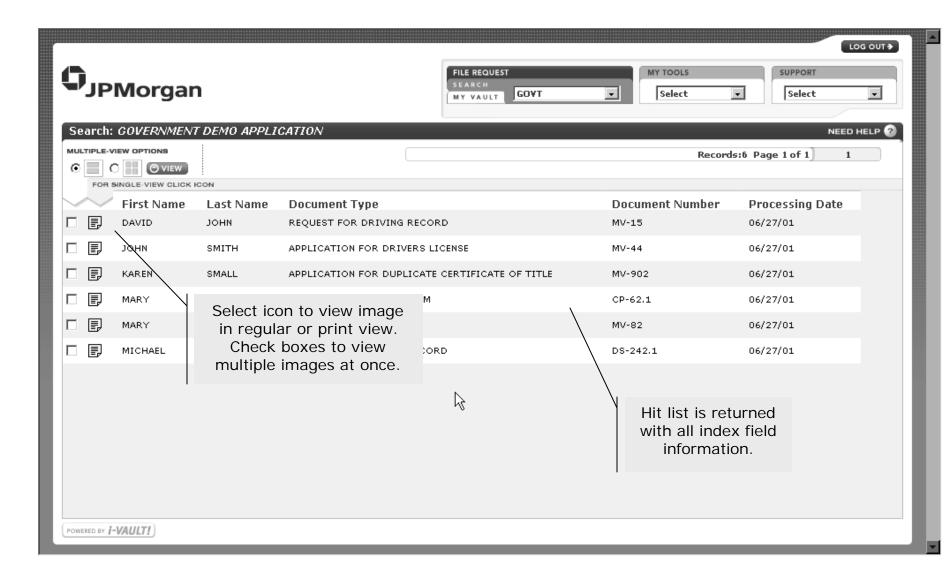 - Group administrator
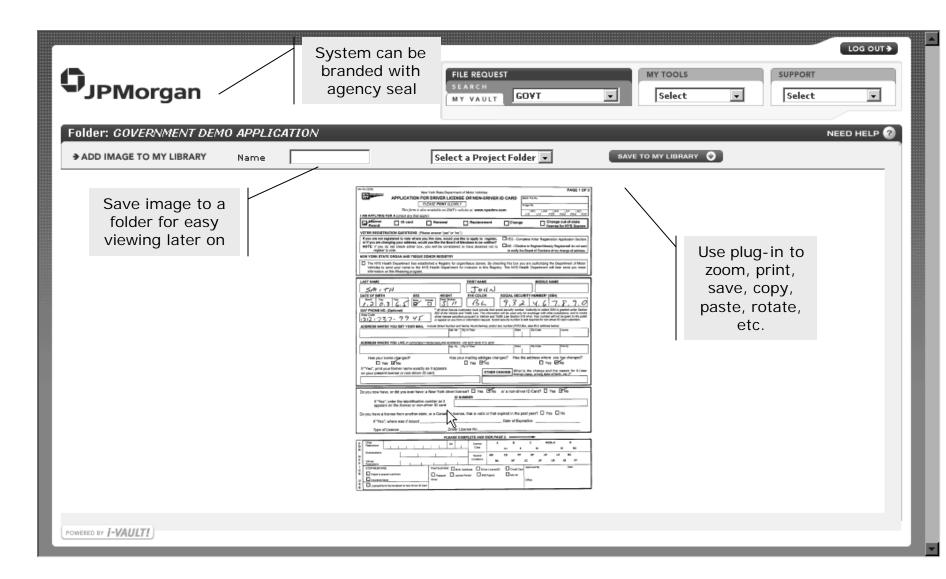 - User

User logon screen

Log on with 128-bit encryption technology

Search capabilities

Choose an item to view after running a search

Viewing an image

System can be branded with agency seal

Save image to a folder for easy viewing later on

Use plug-in to zoom, print, save, copy, paste, rotate, etc.

LOG OUT →

FILE REQUEST	MY TOOLS	SUPPORT
SEARCH	Select	Select
MY VAULT GOVT		

Folder: *GOVERNMENT DEMO APPLICATION*   NEED HELP ?

→ ADD IMAGE TO MY LIBRARY   Name [   ]   Select a Project Folder ▾   SAVE TO MY LIBRARY ⊙

POWERED BY *i-VAULT!*

Questions?

Thank you for attending!

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